

## Report to the Commissioners, prepared by Lisa Sheppard, Director April 21, 2020

On the last page are two tables, one for performance measures and one for workload indicators, showing:

FY 2018 actuals  
FY 2019 annual targets  
FY 2019 actuals  
FY 2019 actuals as a percentage of annual targets  
FY 2019 actuals as a percentage of FY 2018 actuals  
FY 2020 actuals to date  
FY 2020 annual targets  
FY 2020 actuals as a percentage of FY 2020 annual targets

**The general target is 75% for FY 2020 to date, July 1, 2019-March 31, 2020**, keeping in mind that some numbers will be unevenly distributed throughout the year, some will lag 30-90 days due to subcontractor billing/reporting and some will change during the end of the fiscal year reconciliation process. Additionally, all clients are counted as “new” in July, which results in total client numbers being substantially above the annual target at the beginning of each fiscal year. This effect diminishes as the year progresses. Some information is not yet available and will be reported in future months. Additional detail may be reported in the program sections below. Numbers highlighted in yellow have been revised since the last report.

### Data to note:

- DPHHS has resolved many but not all of the data entry and reporting problems associated with the new state database system.
- **Nutrition**
  - We suspended social dining (congregate meals) on March 16<sup>th</sup> due to COVID-19. We offered clients the option of home-delivered hot meals and/or frozen meals for pick-up.
  - With DPHHS approval, we extended home-delivered meal eligibility to adults 60+ and those under 60 with a disability who are unable to obtain meals because they are sheltering in place or self-quarantining.
  - We have significantly increased outreach for home-delivered meals/frozens to reach people who are in need due to COVID-19.
  - In March, we had 54 new home-delivered clients (compared to 16 in January and 6 in February, and 25 this same time last year). These numbers reflect approximately 2-weeks of congregate meal closure and 4 days of the statewide Stay-at-Home Directive.
- **Transportation**
  - Although ridership was high in February and on track to increase in March, multiple community and service changes related to COVID-19 resulted in a significant decrease in rides (3,177) from February to March, including: CDC guidance to older adults and people with disabilities to limit public exposure, guidance to limit public gathering of 10 or more, the statewide order closing schools effective March 16<sup>th</sup>, the closure of congregate meals and

senior center activities on March 16<sup>th</sup>, Eagle Transit's suspension of fixed route and commuter service on March 25<sup>th</sup>, and the statewide Stay-at-Home directive effective March 26<sup>th</sup> and subsequent closures of non-essential businesses.

- Paratransit/premium Dial-A-Ride service continued as usual in March, but there were fewer places to go and riders had begun to limit their rides in an effort to reduce public contact.
- In March, we added a twice weekly run to transport volunteers from the Flathead Food Bank in Kalispell to deliver food to those in need. In April, we added a similar run on Fridays in partnership with the North Valley Food Bank. We only count the volunteers' rides so the impact on our ridership will be minimal, but the impact on our community is substantial. **In less than one week, we assisted volunteers in Kalispell to deliver food to 328 households.**

▪ **Information and Referral/Assistance**

- **Outreach/Education** efforts continue to outpace the target.
- In the second half of March, efforts shifted from Medicare/BEC to Meals on Wheels/Friendly Caller outreach and assisting people to access COVID-related information and services.

▪ **Independent Living Services**

- The total "units of service" for all services combined continue to be substantially below target due to industry-wide paid caregiver shortages, which is now being further affected by COVID-19. Clients have begun to ask that their services be put on hold, a few because they have family available to assist them in the short-term, most others because they are fearful of having anyone come into their home and risk exposing them to the virus.

▪ **Benefits Counseling**

- As expected, the cost savings for clients and hours of service have exceeded the annual target due to Medicare Open Enrollment October-December.
- We were still taking in-office appointments through March 17<sup>th</sup>. All contact after that were made via phone or email. We fielded 335 more contacts in March than in February.

▪ **Ombudsman**

- Ombudsmen stopped in-person facility visits in March due to the high risk to residents. All consults with facility staff, residents and families is now being made via phone or email.
- Staff are seeing an escalation of family and resident stress, especially for those with dementia, related to COVID-19 restrictions and concerns due to the particular vulnerability of this population.

***See each section below for relevant updates on COVID-19 Response.*** We are re-evaluating the status of all our programs as new state directives are issued every two weeks and will consult with the Health Officer prior to making any changes.

**AOA Administration**

***Budget and Contracts***

- We continue to work with Finance on the FY 2021 budget in preparation for the Commissioner review on April 30<sup>th</sup>. We have not yet received federal allocations from DPHHS for FY 2021 and so are assuming flat funding for budget purposes.
- FY 2020 Budget Amendments
  - Prior to COVID, we received notice from DPHHS of amended federal allocations for FY 20, which resulted in some relatively minor increases and decreases in specific funds and a very small overall increase.

- As a result of COVID, we have received and will be receiving additional increases in Older Americans Act federal funding to assist in our immediate and emerging response and future preparations. We will be able to carry these funds forward into the coming fiscal year.
  - As part of the Families First Coronavirus Response Act (FFCRA), we are receiving an additional \$84,279 in nutrition funds. The funds do not require a local match and are intended to be spent prior to regular funding allocations effective March 20, 2020. We have through September 2021 to spend them.
  - We will be receiving additional Title III funds through the Coronavirus Aid, Relief, and Economic Security (CARES) Act. We do not yet know specific funding amounts but expect to hear within the next week or two.
- We are in the process of developing an amended DPHHS contract budget based on the changes above.
- We are also receiving additional federal funding for transit as part of the CARES Act. The state has not yet made an allocation by area. The funds do not require a local match and are intended to be spent prior to regular funding allocations effective January 20, 2020. MDT is not requesting a contract amendment at this time, but that may change.
- We will request adjustments to the county budget at the next opportunity.

### ***Building***

- Our South Campus office, along with the Kalispell Senior Center, remain closed to the public due to COVID-19 restrictions. We have large signs posted at the dining room and AOA office suite noting the closures, assuring people we are still here to serve the public and directing visitors how to contact us.
- The South Campus building itself is open so the Elections Office can continue to operate, but traffic is much reduced overall due to the suspension of in-person aging services and limited access to the Planning and Zoning and Environmental Health offices.

### ***HR/Staff Development***

- We have experienced some temporary loss of staff due to COVID-related leave.
- We continue to work with HR to restructure some existing positions and request new positions related to Older Americans Act/VA programs and transit increases.

### **State/Federal/Legislative Issues**

- MT DPHHS has contracted with a new State Ombudsman. This position is independent of DPHHS and oversees the implementation of the Ombudsman, primarily through Area Agencies on Aging.
- Montana Area Agencies on Aging Association (M4A) - M4A advocates for aging services funding and policies that support older Montanans.
  - Lisa and Beth are participating in weekly conference calls (every Monday) with other Area Agency on Aging directors and DPHHS State Unit on Aging staff to share information about COVID responses and resources and to receive state/federal updates. There will be no quarterly meeting in April.
  - M4A recently received a \$100,000 grant from Blue Cross Blue Shield to support Area Agencies on Aging to provide additional services to older adults affected by COVID.
  - DPHHS in partnership with M4A is applying for a \$300,000 grant from the Administration on Community Living to coordinate a statewide effort, led by Area Agencies on Aging, to meet emerging and ongoing needs related to COVID and its aftermath.



- National Association of Area Agencies on Aging (n4a) – n4a advocates for funding and policies that support older Americans and enable the aging services network to meet their needs; it provides training and technical assistance to us as members
  - n4a is providing valuable, updated information related to the national COVID response, federal funding and local/regional examples of creative problem-solving on the part of the aging network.
  - As of March 11, 2020, the House and Senate unanimously approved a bipartisan bill to reauthorize the Act for 5 years, called the Supporting Older Americans Act. It is awaiting presidential signature.

### **AOA Advisory Council**

- The Council last met on March 12<sup>th</sup>.
- The next meeting is scheduled for May 14, 2020. If we are unable to meet in person, we will determine an alternative means of meeting/communicating.

### **Outreach/Education/Media/Events**

Note: Transportation related outreach is noted in the Eagle Transit section below.

- 3/2/2020: KGEZ monthly interview, 15,000
- 3/4/2020: BEC/2EC assistance for residents at Kalispell Senior Apartments, 11
- 3/5/2020: VDC Program outreach at Healthcare Coalition meeting, 22
- 3/6/2020: presentation to Leadership Flathead, social service organization panel, 45
- 3/11/2020: Medicare/BEC/SMP presentation to Job Service staff, 15
- 3/19/2020: distribution COVID-19 flier from Health Department, 310
- 3/19/2020: distribution COVID-19 Legal Services flier from DPHHS, 310
- March commercials on KGEZ (BEC until mid-March then switched to Meals on Wheels/Friendly Caller): 48 ads per month, 15,000 per run
- Posters/fliers to alert visitors and clients to closures and changes in service delivery
- Multiple updates to website re. closures, new services and other COVID-related information

### **Eagle Transit**

- COVID-19 service changes and precautions currently in place:
  - Suspension of fixed route service in Kalispell
  - Suspension of commuter service between Kalispell, Whitefish and Columbia Falls
  - Reduction of fixed-deviated route in Columbia Falls from M-F to one day per week (Tuesday)
  - Continuation of Whitefish fixed-deviated route M-F with 6-foot distance between riders
  - Continuation of Paratransit and Premium Dial-A-Ride service as usual in Kalispell and Evergreen with attempts to provide one-on-one rides as much as possible; request of passengers to voluntarily limit rides to essential services only
  - Addition of Flathead Food Bank run twice a week, and North Valley Food Bank once a week, where we take volunteers to deliver food to those in need living in low-income apartment complexes/other residences
  - Adjustments to seating arrangements inside buses to ensure at least 6 feet between drivers and passengers
  - No fares collected to reduce possibility of exposure at time of exchange and in counting process
  - Enhanced cleaning of all vehicles and offices

- Continuing to try to secure PPE for drivers and believe we may have an order of masks nearing delivery
- Closure of offices to the public (very little walk-in visitation normally but closed as a precaution)
- Montana Department of Transportation (MDT) and Federal Transit Administration (FTA):
  - COVID-related activities:
    - Staff have closely monitored all federal websites and national publications to determine guidance related to COVID and examples of transit system responses as well as CARES Act provisions.
    - Staff participated on several FTA national conference calls.
    - We requested a waiver of certain 5311 rules through FTA's Emergency Relief Docket to allow us maximum flexibility in our COVID response. We have not yet heard back from FTA but have managed to reconfigure our services within existing rules.
    - Staff participated on one MDT statewide conference call (4/9/20) to discuss CARES Act funding and parameters. As noted above, we have not received a specific allocation. However, MDT has informed us that per FTA all expenditures for this fiscal year from January 20<sup>th</sup> will be reimbursed by CARES Act funds at 100%, no local match required and no reduction made for fare collections. All COVID-related leave will be covered. We can also request payment for any operational or capital costs that support us to prevent, respond to or prepare for COVID-related concerns or conditions (including negative economic impact on the community and/or the transit system itself) now and going forward.
      - We are in discussion with MDT staff about several items/projects for additional funding, including the purchase of several smaller vans that would allow for greater flexibility during distancing restrictions and would support a volunteer driver/Older Americans Act program during normal operations.
  - Third quarter financial and program reports are due at the end of April. We will file two financial reports, one for January 1-19, 2020 under our annual 5311 allocation, and one for January 20-March 31, 2020 under the CARES Act funding.
- Outreach/Education/Media/Special Events:
  - COVID-19
    - Ongoing updates of the Eagle Transit website regarding schedule and service changes
    - Fliers on buses regarding 3/25 suspension of fixed route services in Kalispell and reduction of Columbia Falls service to once a week
    - 3/25/2020 press release to alert communities of service suspensions and reductions
    - Multi-media coverage of partnership with Food Bank to deliver food during shelter-in-place.
  - On 3/2/2020, Tom Schneider participated in a Town Hall meeting in Bigfork to update them on transit options under consideration for the Bigfork area.
  - To satisfy federal regulations, daily radio ads ran on KGEZ.
- Operations:
  - We continue to research the possibility of converting our buses to propane as it would offer significant costs savings on fuel. This option is also of particular interest to the TAC.
  - We are still planning to implement expanded service for older adults and people with disabilities, including using Eagle Transit staff directly and/or developing/implementing a volunteer driver program. We still hope to move forward before the end of the fiscal year and are exploring how to best fund the service using either Older Americans Act and or federal transit funds.

- Transportation Manager Tom Schneider has met with three of the four senior center boards about possibly partnering on a volunteer driver program.
- Staff Development/Training:
  - We're working with HR to, with Commissioner approval, restructure some positions and add permanent and temporary positions in line with our FY 2021 budget as submitted to MDT.
  - The Montana Transit Association canceled the Spring Conference which was to be held here in Kalispell.
- Transportation Advisory Committee (TAC)
  - The TAC meeting scheduled for April 2, 2020 was canceled due to COVID-19.
  - The next regularly scheduled meeting is June 4, 2020.
- Glacier National Park
  - Glacier National Park has contracted with L.C. Staffing to operate the summer 2020 shuttle.
  - Superintendent Jeff Mow approached us about meeting via conference call in early May with GNP, regional NPS and the Volpe National Transportation Center (part of USDOT) to begin a conversation about potential long-term options, including the Mountain Climber. Volpe is developing a white paper summarizing previous plans that will serve as the starting point for a transportation work group convened by GNP to include regional, state and local stakeholders. We agreed to participate in the preliminary discussion.

## **Nutrition**

- COVID-19 Response
  - Suspended social dining (congregate meals) at all sites on March 16<sup>th</sup>; called all regular clients and offered them the option of hot, home-delivered meals and/or frozen meals for pick-up. (Weekly frozen meals provided have more than doubled in the last month.)
  - Expanded home-delivery to include both older adults and people with disabilities under 60 who normally get their own meals but are restricted in their ability to do so because of COVID.
  - Increased frozen meal delivery to Meals on Wheels clients for evenings and weekends.
  - Now offering weekly "Snack Packs" with easy to eat, non-perishable items like granola and protein bars, trail mix, fruit cups, etc., along with Ensure and/or a roll of toilet paper on request – the response to this service has been very positive as many people aren't able to easily get groceries at this time.
  - Developed and implemented safety protocols for Meals on Wheels drivers/delivery; offered donated cloth masks to driver as we continue to be unable to obtain real PPE.
  - Connecting people to grocery delivery services; assessing whether we need to add grocery/pharmacy delivery to our service array or if we could support other organizations in their efforts.
  - Substantially increasing outreach regarding nutrition services, including PSAs, radio/TV interviews, ads, distribution of fliers (including in Food Bank deliveries), etc.
  - Stocked up on food/commodities and home-delivery supplies; we have enough to sustain us at 600 meals per day for several months (we have not yet reached that threshold).
- We have discontinued providing meal support to Friendship House as they no longer meet the criteria for assistance.
- Annual surveys have been delayed because of COVID-19.

## **I & R/Assistance/Ombudsman/Independent Living Services**

- General Information and Assistance COVID-19 Response
  - We are continuing to provide all Information and Assistance and benefits counseling services by phone and email; approximately 1/3 of our contacts in March were related to COVID.
  - Resource Specialists are providing more frequent check-in calls for existing independent living clients who want them and have expanded our Friendly Caller program
  - Resource Specialists have assisted with screening/enrolling new Meals on Wheels clients.
  - Resource Specialists daily monitor updates on COVID benefits/resources and how COVID is impacting Medicare, Medicaid, SNAP and other programs critical for older adults.
  - Staff have developed and are constantly updating a community resource list specific to the Flathead to assist callers.
  - We are engaged in an expedited community assessment process to determine what needs arising from COVID are unmet; preliminary results point to grocery/pharmacy delivery, access to essential goods, laundry, pet care, maintaining social connections and combatting increased isolation (which was already a crisis prior to COVID) and support for rising mental health needs (including training for staff to recognize and respond).
- Veteran Directed HCBS Program:
  - COVID-19
    - The CARES Act includes flexibility in processes and procedures to allow enrollment and recertification of veterans without face-to-face contact as well as protections for payments to caregivers. Our staff were instrumental in providing Senator Tester's office with the information needed for the Veteran's Affairs Committee to address these issues in the Act.
    - Services to enrolled veterans have not changed.
  - Despite the CARES Act allowing for flexibility, the MT VA has decided to temporarily suspend new enrollments, citing pending, non-COVID changes in the process. We are attempting to get clarity on the details of the proposed changes and the timeframe for resuming enrollments. We were able to process two enrollments before the suspension.
  - We have a total of 39 vets enrolled. This is down from a high of 43 last month. Two new vets enrolled and six disenrolled. Disenrollment occurs for a variety of reasons, most typically death or entry into a long-term care facility.
  - We've added a .5 Veteran Care Coordinator.
- Independent Living Services:
  - COVID-19
    - The paid caregiver shortage has been somewhat exacerbated by COVID-19.
    - Quite a few clients have asked that their service be suspended temporarily as they are uncomfortable having someone come into their home for fear of exposure.
    - Staff are routinely checking in with clients to make sure they are ok, assessing whether they are at increased risk and determining what other services we might connect them with.
    - Annual surveys have been delayed because of COVID-19.
- Ombudsman Program
  - COVID-19
    - Ombudsman staff are not visiting facilities in person. They are maintaining monthly contact with residents, families and facility staff via phone and email. DPHHS instructed staff to ask each facility for a roster of residents and family contacts to facilitate continued direct communication and to distribute a letter and flier to each resident reminding them of their rights and access to an ombudsman.

- Staff continue to monitor and follow-up on incident reports.

**Senior Centers** - A primary AOA focus is outreach to area Senior Centers to build relationships, extend support, and explore new opportunities for partnership.

▪ COVID-19:

- All centers are closed for social dining (congregate meals) and onsite activities.
- Staff are checking in on members and regular diners.
- Funding to the centers continues as usual per Administration on Community Living (ACL) guidance.
- Volunteers from the Kalispell Senior Center donated home-made cloth masks for Melas on Wheels drivers.



# April 2020 Report: Performance Measures Tables - March 2020 stats (FY 2020)

75.00%

MEASURE	FY 2018 Actuals	FY 2019 Target	FY 2019 Actuals	FY 2019 % of Target	FY 2019 as % FY 2018	March	Total Last Report	Total/Avg. to Date	FY 2020 Target	% Target
# Receiving Independent Living Services	110	98	98	100%	89%	0	70	70	119	59%
# Receiving Meals on Wheels	374	465	401	86%	107%	54	387	441	465	95%
# Seniors Receiving Congregate Meals	1,404	1,200	1,538	128%	110%	25	1,367	1,392	1,200	116%
# Eagle Transit DAR Unduplicated Riders	331	450	333	74%	101%	7	241	248	450	55%
Client Savings from Benefits Counseling	N/A	N/A	N/A	N/A	N/A	\$17,328	\$537,332	\$554,660	\$400,000	139%
% of IL Service Recipients at Moderate to High Risk of Institutionalization	92%	88%	93%	106%	101%	88%	91%	88%	88%	100%
Per Meal Cost of Nutrition Services	\$6.29	\$7.00	\$6.80	97%	108%	\$6.70	\$6.12	\$6.70	\$7.00	96%
% Overall Satisfaction with Nutrition Services from Annual Survey	97%	95%	97%	102%	100%	N/A		0%	97%	0%
% Overall Satisfaction with Independent Living Services from Annual Survey	90%	95%	97%	102%	108%	N/A		0%	90%	0%
Maximum annual number of transportation complaints	12	36	4	11%	33%	Not yet available	13	13	25	52%
WORKLOAD INDICATOR	FY 2018 Actuals	FY 2019 Target	FY 2019 Actuals	FY 2019 % of Target	FY 2019 as % FY 2018	March	Total Last Report	Total/Avg. to Date	FY 2020 Target	% Target
<b>Nutrition</b>						March				
Total Meals	80,639	80,000	78,515	98%	97%	7,199	59,531	66,730	80,000	83%
MOW	47,409		46,658	N/A	N/A	5,412	36,893	42,305		
Social Dining (Congregate)	33,230		31,857	N/A	N/A	1,787	22,638	24,425		
Nutritional Assessments Conducted	1,846	2,000	1,858	93%	101%	127	1,140	1,267	2,000	63%
<b>Transportation</b>						March				
Total Ride Count	99,104	90,000	116,017	129%	117%	6,161	75,020	81,181	100,000	81%
Paratransit/Dial-A-Ride Count	31,645	30,000	26,784	89%	85%	1,457	15,617	17,074	30,000	57%
City, Commuter and Other Ride Count	67,459	60,000	89,233	149%	132%	4,704	59,403	64,107	70,000	92%
Eagle Transit Outreach/Special Events	42	15	31	207%	74%	6	32	38	25	152%
<b>Information and Referral/Assistance</b>						March				
Outreach, Information, Referral Contacts	19,429	18,000	26,014	145%	134%	2,075	14,594	16,669	18,000	93%
Outreach/Education/Media Efforts	116	120	129	108%	111%	11	91	102	120	85%
<b>Independent Living</b>			66%			March				39%
Homemaker Hours	2,005	1,324	1,433	108%	71%	172	1,146	1,318	2,000	66%
Escorted Transportation Rides	2,314	1,391	886	64%	38%	56	480	536	2,174	25%
Respite Hours	2,079	3,250	1,793	55%	86%	148	917	1,065	2,857	37%
Comm. Support/Sr. Companion Hours	1,310	1,176	508	43%	39%	30	353	383	1,471	26%
Personal Care Hours	231	65	146	225%	63%	6	89	95	174	55%
<b>Benefits Counseling</b>						March				
Benefits Counseling Hours of Service	502	450	1,193	265%	238%	28	585	613	500	123%
<b>Ombudsman</b>						March				
Ombudsman consults/cases opened	1,250	1,100	1,116	101%	89%	108	648	756	1,000	76%